

Message Text

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ACTI*N SS-30

INFO OCT-01 *SO-00 SSO-00 NSCE-00 /031 W

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O 091601Z JAN 74

FM AMEMBASSY THE HAGUE

TO SECSTATE WASHDC IMMEDIATE 2708

C O N F I D E N T I A L THE HAGUE 0117

EXDIS

E.O. 11652: GDS

TAGS: ENRG, NL

SUBJECT: NETHERLANDS PETROLEUM SUPPLIES

REF: (A) STATE 2668, (B) HAGUE 5563, (C) STATE 241172

1. MOEA STATISTICS AND ESTIMATES COMPILED FROM REPORTS OF OIL COMPANIES OPERATING IN NETHERLANDS SHOW ARRIVALS (INCLUDING SOME IMPORTS FOR TRANSIT - SEE PARA 4) OF CRUDE AND SEMI-REFINED OIL TOTALING 4.5 MILLION METRIC TONS DURING 4 WEEKS FROM 7 DEC THROUGH 3 JAN, VERY CLOSE TO ESTIMATES AVAILABLE AT TIME OF UNDERSECRETARY DONALDSON'S VISIT 17 DEC. THIS FIGURE CONTRASTS WITH 9.3 MILLION TONS IMPORTED DURING 4 WEEKS FROM 22 OCT THROUGH 18 NOV. ESTIMATES OF ARRIVALS FOR JANUARY AND FEBRUARY HAVE GONE UP IN THE LAST WEEK PARTLY AS RESULT OF SAUDI ARABIAN AGREEMENT TO ALLOW BELGIAN (MAINLY CHEVRON) SHIPMENTS TO TRANSIT ROTTERDAM AND PARTLY AS RESULT OF REVIEW OF SUPPLY FOR NETHERLANDS. IMPORT FIGURES AVAILABLE 17 DEC AND 9 JAN ARE SHOWN FOR COMPARISON:

CRUDE IMPORT FIGURES AVAILABLE 17 DEC (IN THOUSAND METRIC TONS):

ACTUAL FOR WEEK ENDING 6 DEC	1,311
EST. REST OF DEC	4,391
EST. JAN	4,764
EST. FEB	4,526

CRUDE IMPORT FIGURES RECEIVED 9 JAN:

ACTUAL 7 DEC - 3 JAN	4,494
EST. REST OF JAN	5,922

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EST. FEB	5,383
EST. MAR	5,306

2. STOCKS OF CRUDE AND SEMI-REFINED OIL, WHICH REACHED A HIGH

OF 5.5 MILLION METRIC TONS AS OF 23 NOV, WERE DOWN TO 3.7 MILLION ON 3 JAN AS COMPARED TO 4.2 MILLION FORESEEN FOR THAT DATE AS OF 17 DEC. THIS WAS CAUSED BY LARGER VOLUME OF REFINING AND MODESTLY LARGER EXPORTS THAN WERE ESTIMATED AT THAT TIME. INCREASED REFINING WAS RESULT OF CONSCIOUS DECISION TO SHIFT SOME PRODUCTION FROM JANUARY INTO DECEMBER AND WAS ENCOURAGED SOMEWHAT BY ESTIMATES OF BETTER OUTLOOK FOR IMPORTS (SEE ABOVE). PRESENT CRUDE STOCK ESTIMATES FOR END OF JAN AND FEB ARE SOMEWHAT HIGHER THAN THEY WERE A MONTH AGO. AS RESULT OF INCREASED REFINING ACTIVITY, TOTAL PRODUCT STOCKS AT PRESENT AND FOR NEXT 2 MONTHS ARE HIGHER THAN PREVIOUSLY ESTIMATED. COMPARATIVE STOCK FIGURES ARE SHOWN BELOW:

STOCK FIGURES AVAILABLE 17 DEC (IN THOUSAND METRIC TONS):

	CRUDE OIL	REFINED PRODUCTS
ACTUAL 6 DEC	5,012	5,462
EST. END DEC	4,155	5,040
EST. END JAN	3,124	4,737
EST. END FEB	2,813	4,129

STOCK FIGURES RECEIVED 9 JAN:

ACTUAL 3 JAN	3,661	5,703
EST. END JAN	3,759	5,101
EST. END FEB	3,312	4,711
EST. END MAR	3,383	4,452

3. NOTING THAT PRODUCTS IN CRITICAL SUPPLY ARE KEROSENE, GAS/DIESEL OIL, AND NAPHTHA, AS EXPLAINED BY GON DURING DONALDSON VISIT, WE INCLUDE LATEST AVAILABLE FIGURES BELOW SHOWING ACTUAL AND ESTIMATED RECEIPTS FROM PRODUCTION AND IMPORTS:

RECEIPTS OF PRODUCTS IN THOUSAND METRIC TONS:

	KEROSENE	GAS/DIESEL	NAPHTHA
ACTUAL 7 DEC-3 JAN	119	1,445	591
EST. REST OF JAN	126	1,240	706
EST. FEB	138	1,277	614
EST. MAR	139	1,313	615

THESE PRODUCTION/IMPORT FIGURES MAY BE RELATED TO GON ESTIMATE SHEETS HANDED TO THE UNDERSECRETARY AND KATZ 17 DEC. AND TO CONFIDENTIAL

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ESTIMATES OF SHORTFALL IN REFTEL (B) PARA 9 (WHICH WERE DERIVED FROM SAME ESTIMATE SHEETS).

4. SINCE ABOVE FIGURES ARE COMPILED FROM OIL COMPANY REPORTS, THEY DO NOT INCLUDE TRANSIT SHIPMENTS OUTSIDE OF THEIR OWNERSHIP AND CONTROL, WHICH ARE UNDERSTOOD TO BE CONSIDERABLE. NOR DO THEY INCLUDE IMPORTS UNDER OWNERSHIP AND CONTROL OF INDEPENDENT DEALERS, WHICH ARE BELIEVED TO BE OF COMPARATIVELY MINOR IMPORTANCE. DISPOSITION OF OIL COMPANY SUPPLIES REPORTED ABOVE DOES INCLUDE EXPORTS AND POSSIBLY TRANSIT SHIPMENTS WHICH COME UNDER OWNERSHIP AND CONTROL OF REPORTING COMPANIES. SUCH EXPORT/ TRANSIT SHIPMENTS OF CRUDE APPEAR TO BE ABOUT 30 PERCENT OF IMPORTS, REMAINDER GOING TO REFINING OR STOCKS IN NETHERLANDS.

5. DATA SUPPLIED BY GON TO ASSIST US IN RESPONDING TO REF (A)
ALSO CONTAIN WEEKLY DATA ON ARRIVALS BY SOURCE COUNTRY WHICH
MAY BE OF USE TO ANOTHER AGENCY IN FULFILLING REQUIREMENT LEVID
IN REF (C). THIS ADDITIONAL INFO WILL BE REPORTED IN SEPTTEL.
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Message Attributes

Automatic Decaptioning: Z
Capture Date: 27 JUL 1999
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: PETROLEUM, DOCUMENTS, DATA
Control Number: n/a
Copy: SINGLE
Draft Date: 09 JAN 1974
Decaption Date: 28 MAY 2004
Decaption Note: 25 YEAR REVIEW
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Authority: golinofr
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 28 MAY 2004
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1974THEHA00117
Document Source: ADS
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: 11652 GDS
Errors: n/a
Film Number: P750001-1554
From: THE HAGUE
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1974/newtext/t19740174/abbrzajy.tel
Line Count: 117
Locator: TEXT ON-LINE, TEXT ON MICROFILM
Office: ACTION SS
Original Classification: CONFIDENTIAL
Original Handling Restrictions: EXDIS
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 3
Previous Channel Indicators:
Previous Classification: CONFIDENTIAL
Previous Handling Restrictions: EXDIS
Reference: (A) STATE 2668, (B) HAGUE 5563, (C) STATE 241172
Review Action: RELEASED, APPROVED
Review Authority: golinofr
Review Comment: n/a
Review Content Flags:
Review Date: 22 MAY 2002
Review Event:
Review Exemptions: n/a
Review History: RELEASED <22 MAY 2002 by boyleja>; APPROVED <18 DEC 2002 by golinofr>
Review Markings:

Declassified/Released
US Department of State
EO Systematic Review
30 JUN 2005

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: NETHERLANDS PETROLEUM SUPPLIES
TAGS: ENRG, NL, US
To: STATE
Type: TE
Markings: Declassified/Released US Department of State EO Systematic Review 30 JUN 2005